



# School Budget Planning

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2021-22

*Presented By:*  
*School Fiscal Services Branch*

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# BUDGET PLANNING



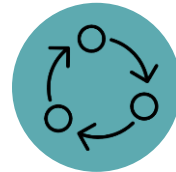
Budget Calendar/  
Budget Process



Community Engagement



What's Continuing?  
What's New?



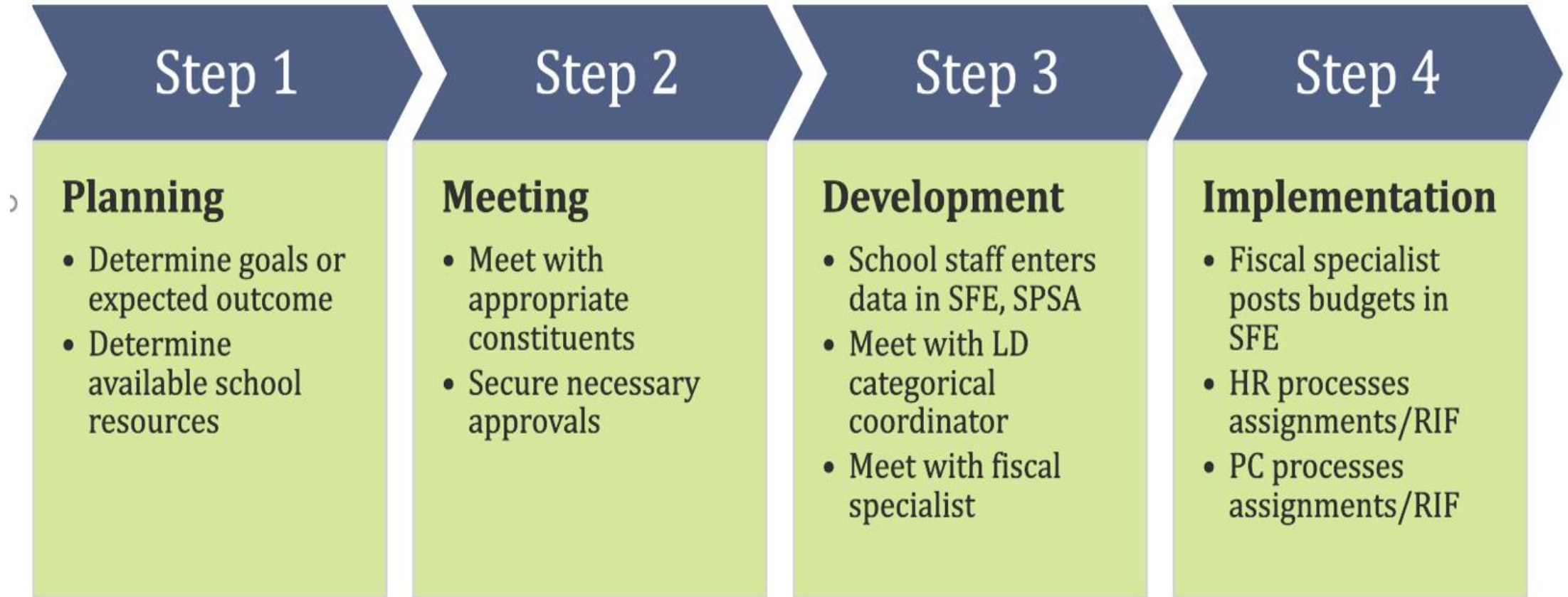
Budget Process Reminders



# 2021-22 Budget Calendar

- **Jan. 14** – E-CAST enrollment
- **Feb. 12** – budget development materials/references posted on School Fiscal Services Branch's website; carryover memo
- **Feb. 16** – Allocation letters and summary will be e-mailed
- **Feb. 18 - Apr. 5** – Schools Front End (SFE) available

# Budget Process





# Community Engagement

## Who are involved in budget planning?

- School administrators
- Teachers
- Parents
- Students
- Appropriate Committees
- **Community of School Administrators**



# **Budget Development Targeted Student Populations Plans**

**February 2021**

Karen G. Long  
Director, Strategy & Innovation

# Targeted Student Population (TSP) Plan

- Targeted Student Population (TSP) Plan is a companion to the SPSA
- TSP Plans are reviewed and approved by COSAs
- Purpose of the Plan is to articulate how TSP funds will be used for increased or improved services and programs to close equity gaps for **students who are English Learners, Low-Income, and/or in Foster Care**

School TSP Plans help tell the story of how the district is supporting students who are English learners, designated as low-income and/or in foster care



# Needs Assessment for Targeted Student Populations



# TSP Plans: Tell Your Story

## WHAT / WHO

Name of Resource	Targeted Student Group(s)	Description of Resource and How It is Used Primarily to Benefit English Learners, Foster Youth or Low-Income Students
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# TSP Plans: Tell Your Story

**WHAT / WHO**

**WHY**

**Description of  
Effectiveness**

**Related District-Wide  
LCAP Metrics**

# TSP Plans: Tell Your Story

**WHAT / WHO**

**WHY**

**HOW**

**Amount of TSP Funds**

# TSP Plans: Tell Your Story

## WHAT / WHO

## WHY

## HOW

Name of Resource	Targeted Student Group(s)	Description of Resource and How It is Used Primarily to Benefit English Learners, Foster Youth or Low-Income Students	Description of Effectiveness	Related District-Wide LCAP Metrics	Amount of TSP Funds



# Actions

- **Reflect:**
  - How have stakeholders been informed about school plans?
  - How are you engaging stakeholders to share how your school is investing in effective actions/programs for students?
- **Use the Flowchart:** Confirm that your school is using TSP funds appropriately to reduce achievement gaps for students in the TSP.
- **Confirm Budget Adjustments:** Ensure that budget adjustments explain how expenditures are supporting TSP students.

For more information,

- refer to the TSP Funds & Planning Guidance
- go to the **District LCAP Website**  
(*achieve.lausd.net/LCAP*)

## Contact:

Community of Schools Administrator

LCAP/TSP: derrick.c.chau@lausd.net

District LCAP: sarah.chevallier@lausd.net

TSP Plans: karen.long@lausd.net

# What's Continuing and What's New?



## What's Continuing?

- Summary of Allocations
- 3-hour library aides (for elem. schs.) and assistant principals are allocated in 10552, SENI
- “Lump sum” allocation in 10552, SENI
- School plans – lump sum allocation in 10552 should be transferred to the 5 LCAP programs

## What's New?

- Earlier and longer budget development timeline
- Advance of *estimated* carryover – now at **80%**
- Donations (13938) and Community Schs. (11125) - added to the programs with advanced carryovers
- Instructional materials – the allocation rates increased by \$2/enrollment
- Option schools will maintain the same number of teachers, counselors, and clerical staff – at the minimum, not less than 2020-21; growth will be implemented
- ROP teachers – 65%, 35%
- Nurse - all school sites will be allocated a full-time position
- 10359, 10543, 10553 – these programs will **end in 2020-21**
- Involvement of CoSAs in the budget process

# NURSES

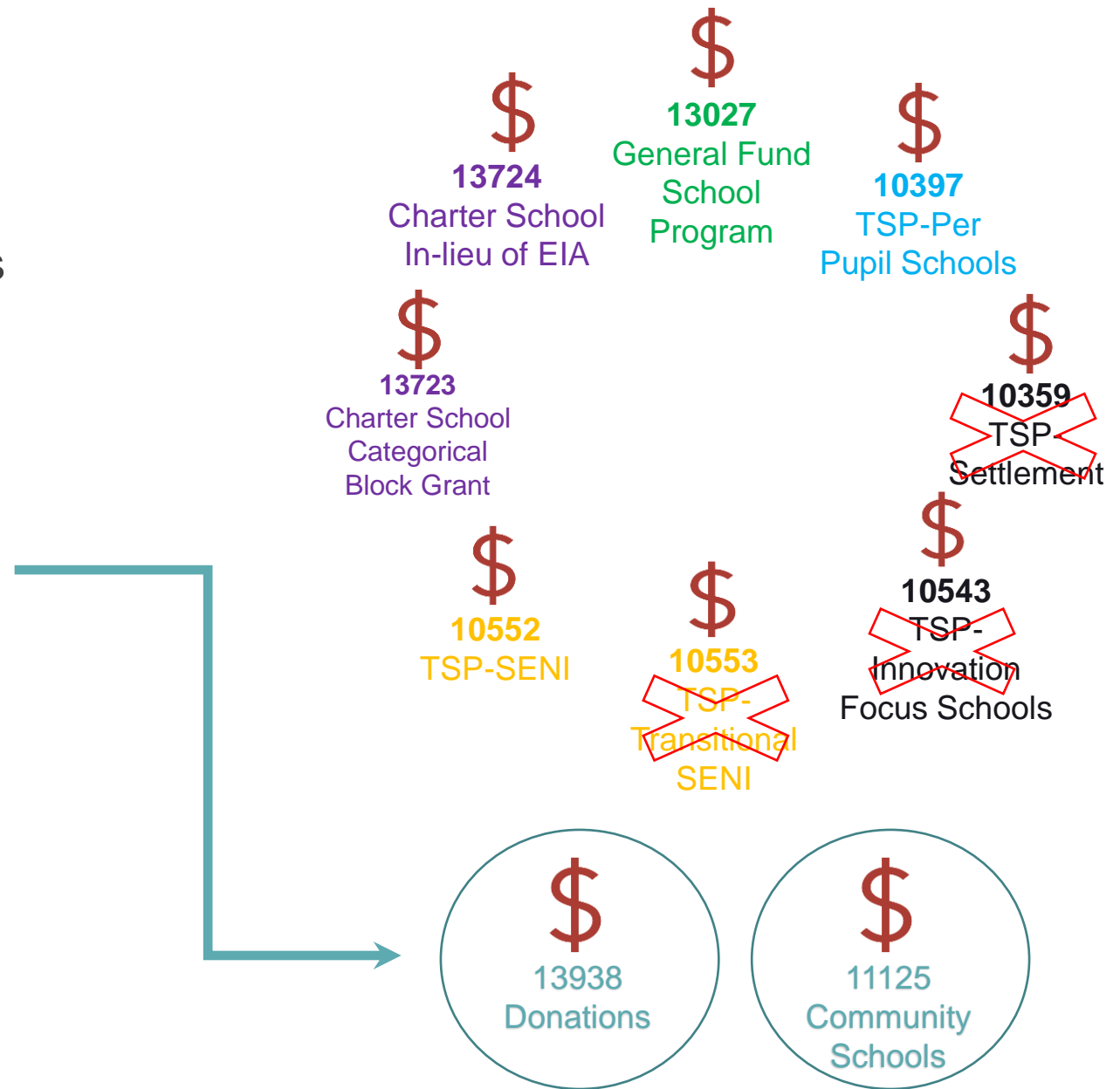
Fiscal Year 2021-22

A full-time nurse will be allocated to each campus for 2021-22.

Question	Answer
Will Option Schools receive a nurse too?	Yes. However, if the Option School is part of a “shared site”, then the nurse is prorated among the schools at the shared site.
Will the District be able to fill all the nurse positions?	(Student Health and Human Services – Nursing Services Department can respond to this.)

# Carryovers

- There is no change to the carryover policy.
- During budget development, schools will receive an advanced amount equal to **80%** of the **estimated carryover**.
  - Adding Donations (13938) and Community Schools (11125) to the advanced carryover
- The **estimated** carryovers for the LCAP programs (10983, 10984, 10985, 10987, and 10988) and 10552 will be placed in **10552**.
- The **final** carryover amounts will be trued-up when the books are closed – by September.





# LCAP Program Codes



Program 10983

**Goal 1**, 100% Graduation



Program 10984

**Goal 2**, Proficiency For All



Program 10985

**Goal 3**, 100% Attendance



Program 10987

**Goal 4**, Parent and Community Engagement



Program 10988

**Goal 5**, School Safety

- *To provide better tracking of the LCFF's supplemental and concentration grant (TSP) dollars*
- *To increase budget transparency*

1. Positions will rollover to these 5 LCAP program codes; 2020-21 unspent balances will carry over to 10552.
2. Lump sum (new) allocations are in program 10552 (TSP-SENI).
3. Both the (new) lump sum allocation and carryover in 10552 should be budgeted in the 5 LCAP programs.

# Targeted Student Population (TSP)

## Schools Front End (SFE) Process

**Schools are required to enter the LCAP budgets in SFE based on the LCAP Plan – programs 10983, 10984, 10985, 10987, and 10988.**

There will be no allocation to the 5 LCAP programs, but positions will roll over from FY 2020-21. Schools must:

Step 1 - Create and add budget lines to these programs, as appropriate.

Step 2 - Save these changes.

Step 3 - Print the school budget signature forms and secure all required school-site signatures.

Step 4 - Submit the signed school budget signature forms to the fiscal specialist at the budget development appointment.

The fiscal specialist will:

1. complete the budget adjustment process for these programs by balancing the budgets with funds from program 10552.
2. return to the SFE Work in Progress (WIP) created by the school, balance the budget, and post it.

Note: The total amount budgeted in programs 10983, 10984, 10985, 10987, and 10988 should not exceed the amount in program 10552's pending distribution (commitment item 430009). The only items that should remain in 10552 are the costs of the norm-generated AP position and library aide.

# PROGRAM 10552 and the 5 LCAP PROGRAMS

Fiscal Year 2021-22

Item in 10552	Remains in 10552?	Should be moved to the 5 LCAP programs?
Asst. Principal (norm-generated)	Yes	No
Library Aide	Yes	No
Carryover from 2020-21	No	Yes*
New lump sum amount	No	Yes

\*Carryover can be transferred to the 5 LCAP programs any time during the year, not necessarily during budget development.

Question	Answer
Do we need to clear 10552 in 2020-21?	For 2020-21, at this point, there is no need to move items to the 5 LCAP programs.
What happens to the 2020-21 positions currently in the 5 LCAP programs?	The positions will rollover to the same LCAP program codes and schools may change these to reflect the 2021-22 LCAP.
Will unspent funds in the 5 LCAP programs carry over to 2021-22?	Unspent funds in the 5 LCAP program codes will carry over to 10552.
Which dollars should I include in the LCAP (plan)?	Schools should only <u>plan</u> for the <b>NEW</b> lump sum amount in SENI 10552.

# Budget Process Reminders – Meeting With Your Fiscal Specialist



Submit the following if applicable:

1. Signed Budget Adjustment Request forms
2. Itinerant Personnel Request form
3. Requests for Personnel Action (RPAs) form
4. Teacher Assistant Reduction in Force form (HR5009) for unfunded teacher assistants
5. Signed employee roster memo

# Personnel Commission

By: Donna Barrow, Assistant Director  
Classified Employment Services



**For classified employees, please note the following:**

- Closing a filled position will reassign the incumbent to a vacant position on site if a vacancy is available or, if no available vacancy on site, the incumbent will be reassigned to a different site.
- Positions closed with incumbents who are "housed" or accommodated under the mandated Reasonable Accommodation-Return to Work program may not be vacated immediately due to the sensitive nature of the assignment.
- A decrease in hours to a position during the budget development process will prompt a reassignment for the incumbent based on their collective bargaining agreement.
- An increase/decrease in hours to a position outside of budget development should not be approved unless the employee agrees to the change via an approved Change of Assignment form.



# Budget Development Reports

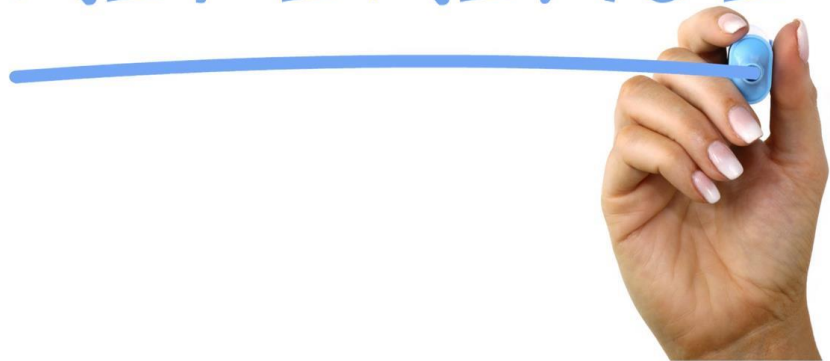
1. From <https://achieve.lausd.net> click “Find a School”, then School Directory.
2. Type the name of the school and click “Search”.
3. From the matches found, click on the school name you are searching for.
4. Click on “Budget Development Reports.”
5. Select the budget report version and click on “Go”.

The screenshot displays the 'School Profile' and 'Performance Indicators' sections of the achieve.lausd.net website. The 'School Profile' section includes a calendar type (SINGLE-TRACK), a 'Demographics' link, and a link to view pedestrian routes. The 'Performance Indicators' section lists various reports like SARC, CAASPP - CDE, and Data Summary Sheet. The 'School Budget Reports' section is highlighted, showing a dropdown menu for selecting a budget version: 'Initial Budget', 'School-approved Budget', and 'Board-approved Budget'. A 'Go' button is visible next to the 'School-approved Budget' option. The 'Fiscal Year and Month' field is also present.

School Profile	Performance Indicators
The school calendar is: SINGLE-TRACK	
Demographics	+ SARC
Click here and select your school to view Pedestrian Routes to School	CAASPP - CDE
+ School Plan for Student Achievement	Data Summary Sheet
+ Targeted Student Population (TSP) Plan	School Experience Survey Reports
	+ Accountability
	School Budget Reports
	+ School Spending Report
	- Budget Development Reports
	Initial Budget
	School-approved Budget
	Board-approved Budget
	Go
	Fiscal Year and Month

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# For your REFERENCE



The following resources are available at

[https://achieve.lausd.net/Page/794.](https://achieve.lausd.net/Page/794)

- [General Fund School Programs Manual](#)
- Carryover Memo
- Estimated Rate Sheets
- Manual Budget Adjustment Request (BAR) form Position/Staffing Simulator
- Request For Itinerant Position forms
- Request For Personnel Action (RPA) form
- SPSA Program and Budget Handbook
- Budget-At-A-Glance (for categorical programs)
- FAQs from Open Houses and current topics

